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FINDING NEW OPPORTUNITIES IN THE LISBON MARKET THROUGH WHITAKER CONSUMER LIFESTYLE SEGMENTATION



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ABSTRACT

A sample of 445 consumers resident in distinct Lisbon areas was analyzed through direct observations in order to discover each lifestyle's current proportion, applying the Whitaker Lifestyle™ Method. The findings of the conducted hypothesis tests on the population proportion unveil that Neo-Traditional and Modern Whitaker lifestyles have the significantly highest proportion, while the overall presence of different lifestyles varies across neighborhoods. The research further demonstrates the validity of Whitaker observation techniques, media consumption differences among lifestyles and the importance of style and aesthetics while segmenting consumers by lifestyles. Finally, market opportunities are provided for firms operating in Lisbon.

KEY WORDS

Whitaker Lifestyle™ Method

Lifestyle Segmentation

Style and aesthetics

Lisbon Market

General Overview

The objective of this project is the study of Lisbon consumers' lifestyles, according to Whitaker International. Each lifestyle's current proportion was discovered through the analysis of a sample of 445 Lisbon consumers whereby population proportions Hypothesis tests were conducted to test the significance of the results. The understanding of each lifestyle's specific aesthetic preferences represents market opportunities for companies to develop suitable products for each identified customer segment. Scott and Parfitt (2005), in their study of the lifestyle impacts in the choices of travel and leisure activities defended that the understanding of the customers' lifestyles has marketing value as it enables the understanding of how a product "fits a customer's life".

This project focuses on the study of lifestyle segmentation according to the Whitaker Lifestyle™ Method developed by the Whitaker family in 1992 in New York City. This method is an instrument that allows the analysis, segmentation and definition of customers by style and aesthetics preferences and has been used in numerous international companies, enabling them to foster profits due to better product positioning and marketing communication.

The research entailed in this project, besides by studying Lisbon consumers through lifestyle segmentation, examines the validity of the observation techniques developed by Whitaker International, through a research that combines observation of customer with in-depth interviews tailored to identify the lifestyle of interviewees through the identification of their Activities, Interests, Opinions (AIO Method) and Values. Further, the customers' media

Finding new opportunities in the Lisbon market through Whitaker consumer lifestyle segmentation

consumption is examined and proposes certain communication strategies for the most relevant Lisbon lifestyle segments.

Whitaker Lifestyle™ Method

The Whitaker Lifestyle™ Method was created to teach companies an easy and practical way of understanding consumer needs. It all started in the nineties by its increasing freedom entailing new professions, new technologies and mainly, new ways of thinking. Each person has a very distinct personality differing from others, which, at that time, was not perceived by most of the companies.

Fatima Whitaker felt an urge to intervene in order to minimize the market gap that existed in the communication between consumers and companies. Her design background allowed her to develop a specific sense of aesthetics which was a starting point to understand that consumers were divided according to particular aesthetic preferences and how this influenced their purchase decisions.

Segmentation allows a better understanding of customers and the development of products to match the specific segments' needs (Scott, 2005). According to Fatima, "segmenting customers through age and income is useless compared to the insights that the understanding of customers lifestyles can bring". This reasoning came from the identification of peoples' aspirational lifestyles and the need to express it through clothing, accessories, homes decoration, cars, holidays and divers further products.

The premise of this method is the belief that lifestyle allows companies to better understand and serve their customers, which was proved by positive business outcomes of Fatima's work with many international and Portuguese companies.

Literature Review

The philosopher and psychiatrist Alfred Adler (1870-1937) introduced the term “style of life” in the early 1900's to refer to the goals that people have and the methods they use to reach them (Thyne et al., 2005; Todd and Lawson, 2001). Later in the 1960's, Lazer (1964) introduced the lifestyle concept in the Marketing field, which was based on the fact that individuals have characteristic patterns of living, which may influence their motivation to purchase products and brands (Miguéis et al., 2012).

The lifestyle segmentation approach divides consumers in different lifestyle types (Zhu et al. 2009), whereby each type is characterized by a unique style of living, measured by a wide range of Activities, Interests and Opinions (Wells and Tigert, 1971; Plummer, 1971).

Schoell and Guiltinan (1992) summarized the marketing field definition of lifestyle as the consistent patterns that people follow in their lives, including how they spend their time and money, and are identified through people's Activities, Interests and Opinions.

Lifestyle provides a richer portrait of the consumer life compared to other segmentation variables such as demographics and socioeconomics (Meidan, 1984; Vyncke, 2002). For instance, as opposed to the lifestyle segmentation, demographic segmentations

give no indication as to why people from different segments consume specific products or services (Craig-Lees et al., 1995; Lawson, Tidwell, Rainbird, Loudon and Della Bitta, 1999).

According to Frank et al. (1972), “lifestyle may be operationalized in two major methods: by the examination of the products the person consumes or by the examination of the person’s activities, interests, opinions, and values” (Scott and Parfitt, 2005).

Like most of the lifestyle segmentation research literature reviewed, the Whitaker Lifestyle™ Method focuses on consumers’ activities, interests and opinions. In particular, the Whitaker Lifestyle™ Method effectively uses both the products consumed and the AIO method through the observation techniques centered on consumers’ clothing, shoes, make-up, hairstyle, accessories, activities, interests and their relationships with friends and family.

As lifestyle arises from people’s values, it can offer insights on the purchase behavior (Todd and Lawson, 2001). In fact, Thyne, in her study of museum visitors’ behavior, found that visitors’ “values” determine why people visit museums and what they expect from the experience (Thyne, 2001).

There is an abundance of literature on the link between consumer lifestyle and product preferences (see Thack and Olsen 2004; Gonzalez and Bello 2002; Plummer 1971; Mathews and Slocum 1970; Mathews and Slocum 1969). According to Craig-Lees et al., “in marketing, the underlying premise is that consumers’ lifestyles will strongly influence their consumption behavior” (Craig-Lees et al., 1995).

A study of the Chinese mobile phone market proved through a regression analysis that consumers with different lifestyles search for different product characteristics (Zhu et

al., 2009). Additionally, it was concluded that the added value of a new product feature varies with consumer lifestyle. From the abundant research done in the consumer behavior area, it can be concluded that lifestyle measures give superior insights of customers, allowing more effective communication and marketing strategies to be implemented. These findings can be extremely important for companies as they may be able to save a lot of marketing and research & development costs through the development of suitable attributes and products for the according customer lifestyle.

Methodology

This project follows the participation in the module of “Creative Customer Management – The Whitaker Lifestyle™ Method” undertaken at Nova SBE and taught by Fatima Whitaker, the creator of the Method. Within the module, the main discussed topics are the Importance of Style and Design Preferences of Consumers in Lifestyle Marketing, the 14 relevant Lifestyle Segments to the Global Consumer, the Lifestyle Retail Concept Development, The Evolution of Style, and the Creativity and Importance of Senses. From the 14 existing Lifestyle Segments, only 9 were considered in this research as they were the first to be developed by Whitaker International and the ones with more detailed information, including an extensive written description of the day-to-day life for both a typical female and male person for each lifestyle segment. These descriptions, developed by the company along the years, are based on a very close study of consumers and contain detailed information about their Activities, Interests, Opinions and Values. An aspect greatly highlighted by Whitaker International is the enormous weight which style and design preferences of consumers have on their purchase decisions. According to Whitaker International, different

lifestyles have very distinct style and design preferences, which make it crucial for companies to identify their customers' style and design preferences in order to create a competitive edge and sustain in the market.

Upon the decision of proceeding with this project, an expert interview with Fatima Whitaker (which followed the interview guide in Appendix 1) was conducted in order to validate the data contained in the observation table and the in-depth interviews (Appendix 2 and 3). Upon insights taken from this interview, adjustments were done to both research instruments.

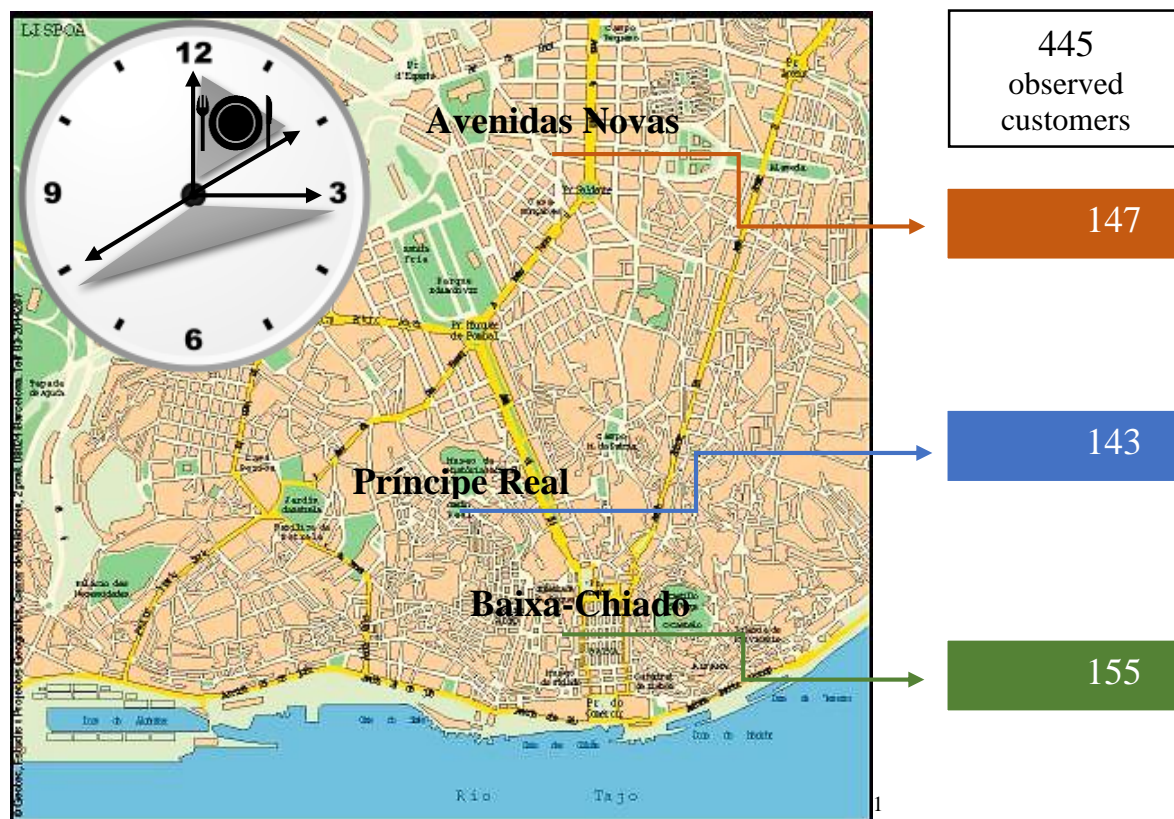
The followed methodology for the customer research was a two-stage process based on observation and in-depth interviews as most researches done on lifestyle segmentation used extensive questionnaires and in-depth interviews as Thyne et al. (2005) and Lawson et al. (1999) as effective analysis tools.

The observation of customers was done through the use of an observation guide (Appendix 2) containing the main observed information about each lifestyle group identified in the analysis of the official Whitaker International documents. The observation of customers entailed, besides the observable appearance reflected in their clothing style and others, the observation and analysis of their actions. As the research objective concerns customers' actions reflected in their interests and activities, a way to discover it is to watch customers taking their actions (Saunders et al., 2009). This process included the systematic observation, recording, description, analysis and interpretation of people's behavior (Saunders et al., 2009).

The observation research was done as a “participant observation”, which is a qualitative method in which the researcher gets involved in the research setting, Avenidas Novas, Baixa-Chiado and Príncipe Real, attempting to study people’s symbolic world (Saunders et al., 2009). The role undertaken was of a “complete observer”, which implies that the identity of the researcher and the purpose of the research were not revealed to the observed people and the researcher did not take part in the activities (Saunders et al., 2009).

The observation of customers, done in two day-time periods, included three different locations of Lisbon, chosen to represent the diversity of the population, as described in this figure:

Figure 1: Representative map of the observation of customers



¹ Source: <http://europa.gratis.es/europa/portugal/lisboa/lisboa-mapa-de-lisboa-i1.jpg>

For the qualitative research, informal and unstructured conversations, in-depth interviews, were done with a total of 8 people. In-depth interviews are often referred to as “qualitative research interviews” (King, 2004) because the structure of the interview may change between interviewees. Some questions may be omitted while others are added and the order of questions may also differ (Saunders et al., 2009). One of the goals of in-depth interviews is to give the opportunity for the interviewees to explain and build on their responses so that the researcher is able to probe answers (Saunders et al., 2009). In the case of this research, in-depth interviews were useful to confirm the information gathered from the observation. In this case, the researcher could make such questions to the interviewee that would enable the confirmation of certain conclusions drawn before, while observing them. This enabled the collection of a richer and detailed set of data (Saunders et. al, 2009).

The interviews were conducted face-to-face in an informal manner with people passing by in the studied locations and took between ten and fifteen minutes on average. The interview themes can be retrieved in Appendix 3.

Data quality issues

A few data quality issues can be associated to the use of in-depth interviews. The lack of standardization may lead to concerns about reliability – whether other researchers would reveal the same information or not. Additionally, there can be problems of reliability related to biases, either an interviewer bias or a response bias. The interviewer comments, tone of voice and non-verbal behavior create a bias in the interviewees’ responses. The interviewer can also demonstrate a bias in the interpretation of responses. The response bias can be

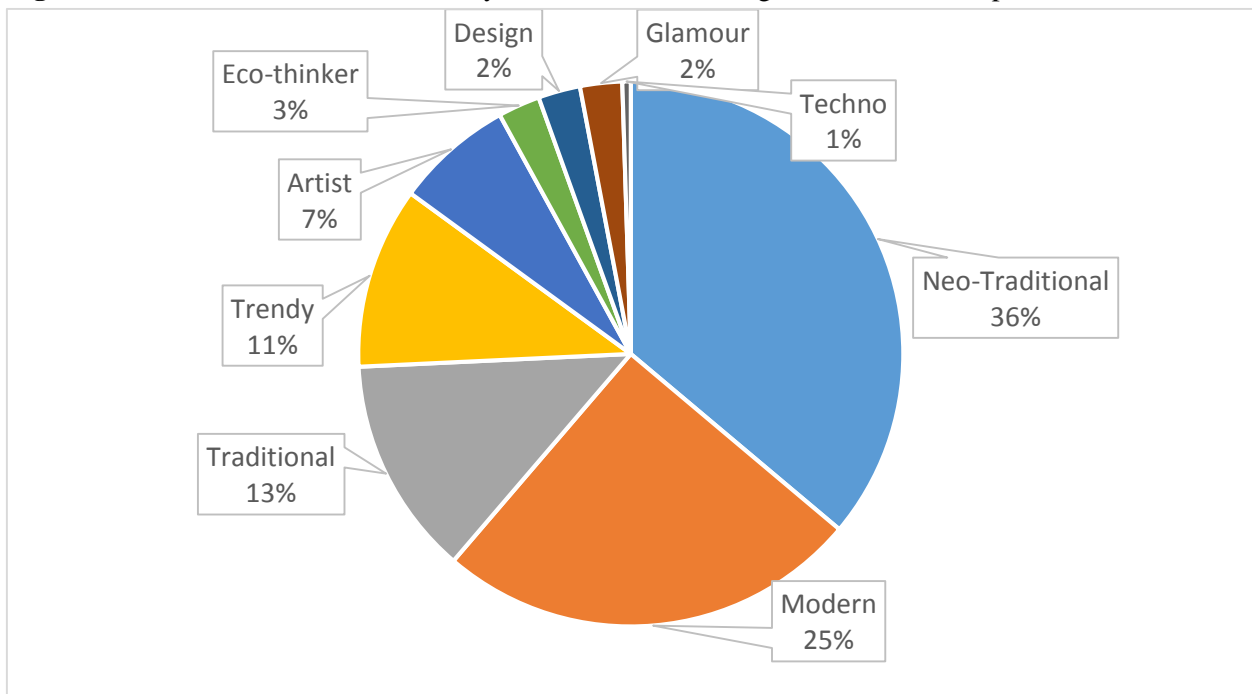
originated due to the unwillingness from the interviewee to reveal and discuss an aspect of the topic that entails sensitive information they do not want to discuss (Saunders et al., 2009).

Regarding the participant observer study, the greatest threat to the reliability of the research conclusions is the observer bias. The interpretation of people's activities, interests, opinions and values is influenced by the common sense and life experiences of the researcher. However, it is possible to control the threat that reliability poses. (Saunders et al., 2009)

Results

The distribution of the Whitaker Lifestyle segments in Lisbon consumers according to the researched sample is as per this graphic:

Figure 2: Distribution of Whitaker lifestyles in Lisbon according to the studied sample



It can be deduced that the Neo-Traditional and the Modern lifestyles are the most relevant, accounting for more than 50% of the studied sample.

As the following table represents, with a significance level of 95% and a p-value equal to 5%, it can be said that the proportion of Lisbon population belonging to the Neo-Traditional lifestyle is higher than the average population proportion ($P_0 = 11\%$). The same can be derived for the population belonging to the modern lifestyle. However, these are the only lifestyles which population proportion was proved to be superior to $P_0 = 11\%$, according to the statistic hypothesis testing results.

Table 1: Hypothesis testing results of the population proportion of Whitaker Lifestyles in Lisbon

	X	N	p_0	\hat{p}	p -value	Result
Neo-Traditional Lifestyle	161	445	0.11	0.36	0	Reject the Null Hypothesis: $p \leq 0.11$ Accept the Alternative Hypothesis: $p > 0.11$
Modern Lifestyle	112	445	0.11	0.25	0	Reject the Null Hypothesis: $p \leq 0.11$ Accept the Alternative Hypothesis: $p > 0.11$
Traditional Lifestyle	58	445	0.11	0.13	0.0983	Do Not Reject the Null Hypothesis: $p \leq 0.11$
Trendy Lifestyle	48	445	0.11	0.11	0.1548	Do Not Reject the Null Hypothesis: $p \leq 0.11$

The distribution of lifestyles obtain from the studied sample presents different proportions across the studied areas of Lisbon as the following table describes:

Table 2: Distribution of Whitaker lifestyles across Lisbon areas from studied sample

%	Neo-Trad	Modern	Traditi onal	Trendy	Artist	Eco-thinker	Design	Glamo ur	Techno
Avenidas Novas	44.2%	15.0%	12.9%	10.2%	6.1%	2.7%	4.1%	4.1%	0.7%
Principe Real	39.9%	46.2%	11.2%	15.4%	7.0%	2.8%	1.4%	2.1%	0.0%
Baixa-Chiado	25.2%	15.5%	14.8%	7.1%	7.7%	1.9%	1.9%	1.3%	0.6%

To test the significance of the previous results, hypothesis tests about the population proportion were implemented. The proportion of the modern lifestyle population is significantly higher in Principe real than in the other areas of Lisbon, while the proportion of the Neo-Traditional lifestyle population is significantly lower in Principe Real than in other areas of Lisbon. The hypothesis tests results concerning differences of population proportion of Whitaker Lifestyles between Príncipe Real and other Lisbon areas are described in the following table:

Table 3: Hypothesis testing results of Whitaker Lifestyles' population proportion in Principe Real

	X	N	p_0	\hat{p}	p -value	Result
Modern Lifestyle in Principe Real	58	112	$\frac{1}{3}$	0.52	$1.7E^{-5}$	Reject the Null Hypothesis: $p \leq \frac{1}{3}$ Accept the Alternative Hypothesis: $p > \frac{1}{3}$

Trendy Lifestyle in Principe Real	20	48	$\frac{1}{3}$	0.42	0.1103	Do Not Reject the Null Hypothesis: $p \leq \frac{1}{3}$
Neo-Traditional Lifestyle in Principe Real	34	161	$\frac{1}{3}$	0.21	$5.04E^{-4}$	Reject the Null Hypothesis: $p \leq \frac{1}{3}$ Accept the Alternative Hypothesis: $p > \frac{1}{3}$
Artist Lifestyle in Principe Real	13	31	$\frac{1}{3}$	0.42	0.1548	Do Not Reject the Null Hypothesis: $p \leq \frac{1}{3}$

The proportion of the traditional lifestyle is significantly higher in Baixa-Chiado than in the other areas of Lisbon, as described in the following table which summarizes the results of the differences of Whitaker Traditional lifestyle population proportion in Baixa-Chiado compared to the other Lisbon areas:

Table 4: Hypothesis tests results of Whitaker lifestyles' population proportion in Baixa-Chiado

	X	N	p_0	\hat{p}	p -value	Result
Traditional Lifestyle in Baixa-Chiado	32	58	$\frac{1}{3}$	0.55	0.0002	Reject the Null Hypothesis: $p \leq \frac{1}{3}$ Accept the Alternative Hypothesis: $p > \frac{1}{3}$

The proportion of Neo-Traditional lifestyle is significantly higher in Avenidas Novas than in the other areas of Lisbon, as the following table describes:

Table 5: Hypothesis test result of Whitaker Neo-Traditional lifestyle population proportion in Avenidas Novas

	X	N	p_0	\hat{p}	p -value	Result
Neo-Traditional Lifestyle in Avenidas Novas	65	161	$\frac{1}{3}$	0.40	0.0290	Reject the Null Hypothesis: $p \leq \frac{1}{3}$ Accept the Alternative Hypothesis: $p > \frac{1}{3}$

There was an expectation for a variation of lifestyles' distribution across neighborhoods, which was the reason for the research to be proceeded in different places so that the overall Lisbon results would include the variety of the Lisbon consumers. Modern lifestyle entails a huge variation across different areas in the studied sample, from a 15% presence until a 41% one. As proved through Hypothesis test of the population proportion, Modern consumers are mostly present in the area of Principe Real where they live, work or spend their free time. This result may be linked to the fact that the majority of homes, activities, stores, restaurants and bars situated in this area have the right design and aesthetic preferences desirable by this segment.

This research was able to prove that consumers of different lifestyles in Lisbon have different style and aesthetic preferences. This was proved in two ways. First, the observation of customers' clothing, shoes, accessories, hairstyle and make-up was accurate for the attribution of their lifestyles, which proves that people dress themselves according to certain aesthetic preferences that are unique and different from other lifestyles. Secondly, when

asked about their dream home, consumers chose accordingly to the expected design preferences, see Appendix 4 for the used home images.

Validity of the observation techniques by the probing questions of the In-depth interviews

The probing questions developed in the in-depth interviews about the people's Activities, Interests, Opinions and Values were able to prove that the observation techniques were correct, as 89% of interviewed consumers, which were initially considered of a certain lifestyle, were concluded to still belong to the same lifestyle after the analysis of the interview.

Results of Media consumption

The media consumption was studied for the two significant greater lifestyles: Neo-Traditional and Modern. The studied sample entailed differences in the consumption of Media across lifestyles as displayed in the following figures 3 and 4:

Figure 3: Percentages of time spent per media activity by Neo-traditional Whitaker lifestyle

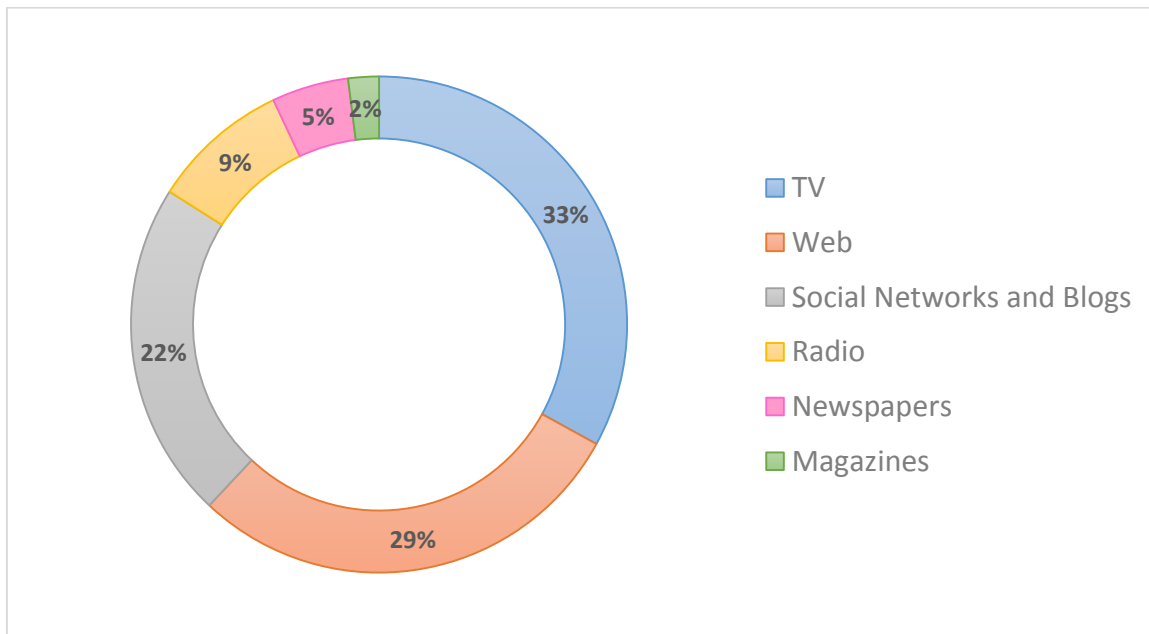
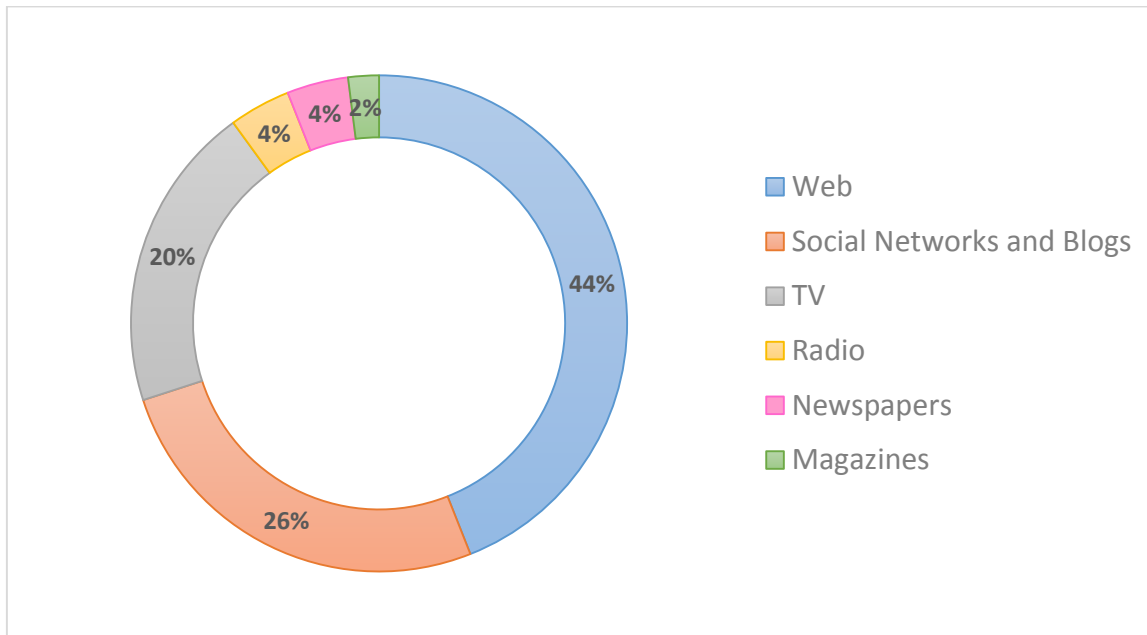


Figure 4: Percentages of time spent per media activity by Modern Whitaker lifestyle



With these results, companies can decide which media channels are most worth to invest in for the communication of products tailored for a certain lifestyle target. Both lifestyles have similar results on the total time spent watching media: 8 hours and 20 minutes for the Neo-Traditional lifestyle and 9 hours for the Modern lifestyle. For companies targeting the Neo-Traditional population, TV constitutes a good media channel, closely followed by the Web. However, if a company is targeting Modern population, it should mainly advertise its products through Websites in general combined with advertisement on Social Networks and Blogs. Regarding the entire sample of customers, magazines, newspapers and radio are the least consumed media, as, on average, less than 13% of all-time spent watching media is spent with these media channels. Watching TV and navigating on social networks, blogs and general websites represent, on average, more than 87% of the total time spent with media.

Unexpectedly, the circumstances and daytime of the consumption of the same media is very similar across all different lifestyles. For instance, Social Networks during daytime, are mostly assessed on smartphones by 88% of all interviewees. Accordingly, Television and Web are used at home and after 9pm approximately by 75% and 63%, respectively.

Conclusion

In the Literature Review, the superiority that lifestyle segmentations in comparison to demographic segmentations attain, was discussed; mainly on matters of understanding customers purchase behavior, including product preferences and products' features value added. Lifestyles are the unique set of living followed by people, which identification has been done by the majority of marketing researchers through customers' Activities, Interests, Opinions (AIO method) and Values.

The used methodology followed the common practices present on literature: the study of Lisbon consumers' lifestyles was done through the observation of their AIO and Values, followed by in-depth interviews used to confirm the validity of the first method.

The results have shown that Whitaker Neo-Traditional and Modern population lifestyles present a significantly higher proportion than other lifestyles in Lisbon, with a p-value equal to 0 with a 95% level of confidence. Additionally, significant differences of some Whitaker lifestyles' population proportions crosswise Lisbon areas were found. Companies may use these results to better position their points of sale according to the target segment. From the in-depth interviews the differences in the visual aesthetic preferences of each lifestyle were pointed out by their choices of dream homes' images, in which unique colors, furniture design, fabrics, among others, were important for the decision process (Appendix

4). In addition, the small sample of customers interviewed was able to demonstrate the differences regarding media consumption patterns.

Besides the limitations of this research related to data quality issues arising from a lack of reliability from both research methods, literature defends that the researcher is able to control the threat that reliability poses by the knowledge of its existence (Saunders et al. 2009).

The opportunities for companies selling to customers residing in Lisbon, derived from the results, are summarized in the following bullet points:

- The use of lifestyle segmentation has numerous advantages in comparison to demographic segmentation. Mainly, lifestyle segmentation gives insights on the consumer purchase behavior (Todd and Lawson, 2001) and consumption behavior (Craig-Lees et al., 1995).
- Consumer lifestyle is linked to product preferences, where consumers from different lifestyles have different product preferences and value the addition of product features in a different manner (Zhu et al., 2009). This provides companies the opportunity to decrease research & development costs by the development of the proper product portfolio and attributes for the target segment.
- Companies should target Neo-Traditional and Modern Whitaker Lifestyles as its population proportion has a significantly higher presence in the Lisbon market than the other Whitaker lifestyles.
- In order to target the Neo-Traditional Whitaker segment, companies' stores should be located in Avenidas Novas and Príncipe Real and the marketing communication done

through a combination of the following media channels by descendent level of importance: television, general websites, social networks and blogs.

- Modern Whitaker segment is correctly targeted with the placement of stores in Príncipe Real and the communication of products done mainly through general websites, social networks and blogs.

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Appendices

Appendix 1: Interview Guide for Expert Interview with Fatima Whitaker

- Description of the intended project and discussion about the Whitaker official information to be included.
- May you describe the origins of the Whitaker Lifestyle Method?
- How is the Whitaker Lifestyle Method applied in national and international companies and what are the results obtained by the companies?
- How do you believe that the Whitaker Lifestyle Method could help Lisbon companies?
- Which industries in particular, of the Lisbon market, do you think that need a better understanding of consumers?
- What benefits the application of the Whitaker Lifestyle Method can bring for consumers?
- Could you please evaluate the quality of the observation table, to be used in the future research, and provide feedback.
- It would also be important that you analyzed the quality of the home pictures, to be used to represent the aesthetic preferences of the different lifestyles, in the future research.

Appendix 2: Guiding table for observation

Lifestyle	Clothing	Colors	Make-up	Hairstyle	Shoes	Accessories
Traditional	Pieces of extreme quality with a perfect fit. Women: Skirts with opaque tights and Blazer. Business: basic suit, white or blue monogrammed shirts, tie. Casual: navy blue blazer, white shirt, khaki trousers. Club: blazer with golden buttons.	Red, navy, white, green and berries	Red lipstick	Polished	Women: 2-inch hill pump Men: Leather lace-ups	Hand bag in shoe color; Printed scarves; diamond engagement and wedding rings; golden watch; pearls.
Techno	Active wear. High tech, high performance fabrics.		None	None	Sneakers	Gadgets
Glamour	Latest hottest designers looks. Fascination with beauty. Loud clothing from sexy designers.		Polished	Polished	Glam designers	Jewelry
Neo - traditional	Practical but professional look.. Low-maintenance look.		Simple but polished	Simple but polished	Heels to work	Not a lot jewelry
Design	Pieces suitable for any occasion. Simple and clean pieces with volume and shape.	Same color head to toe. Greys, black and white.	Natural	Practical		None
Trendy	Follows the latest trends. Cool designer clothing Designers imitations at affordable prices	Trendy	Trendy	Trendy	Trendy	Trendy
Eco - thinker	Own made clothing with natural dyes or Comfortable clothing with natural fabrics.	Neutral colors and colors of nature.	Never			
Modern	Black and white basic pieces. Colorful pieces. Pieces with Volume and Shape.	Black, white and bright colors	Simple and practical	Simple and practical	Comfortable and very stylish.	Large
Artist	Comfortable and very fun fabrics	Bright			Comfortable with fun colors	

Appendix 3: Themes for the In-Depth Interviews

Interview Themes	
Demographics	<p>Sex</p> <p>Birth range</p> <p>First Name</p> <p>Occupation</p> <p>Level of studies</p>
Media consumption	<p>Time spent with each media channel (TV, Social Networks and Blogs, Radio, Magazines, Newspapers and Websites)</p> <p>Specification of consumption (specific brands; circumstances and hours of consumption)</p> <p>Advertisement effectiveness (The recall of advertisement)</p>
Lifestyle	<p>Values</p> <p>Interests</p> <p>Activities</p>
Aesthetic preferences	Style and Design preferences

Appendix 4 – Images used to ask interviewees’ dream home on In-depth interviews.

